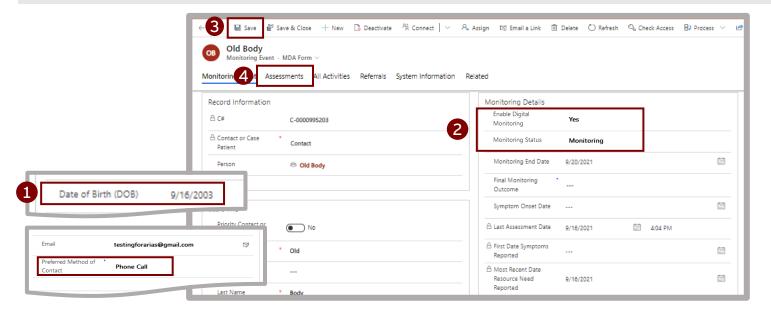
## CCTO Micro-Training: Beginning Monitoring & Assessments





Monitoring refers to reaching out to your contact to assess their symptoms and resource needs, and it may be done digitally or over the phone. Regardless of how you are monitoring your contact, CCTO will be used to document monitoring and store assessments.

**Note:** Your contact may have received a <u>notification</u> from the system and opted to begin digital monitoring through the portal. If so, you may already see an initial assessment completed. Skip to step #4 to check if this is the case.



#### #1: Prepare to initiate monitoring by reviewing all information, especially:

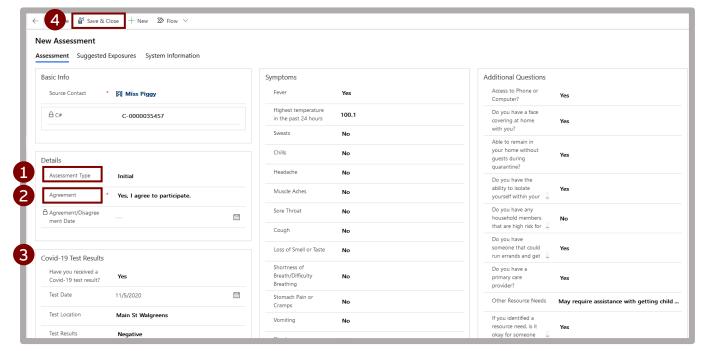
- Date of Birth may or may not contain data. Contacts use this to verify their identity when accessing digital assessments, so you will not be able to turn on "Enable Digital Monitoring" (i.e., auto-sending contacts daily assessment links) until you can obtain a DOB from your contact. This is okay, and you can still enable digital monitoring later. See the last page for more info.
- **Preferred Method of Contact** defaults to "Phone Call," and you can leave this until you determine your contact's preference. This must be updated to allow your contact to receive assessments via text or email. Note: if a contact has responded to a digital notification, they may have already updated this preference.
- #2: Then, initiate monitoring within CCTO: Set Monitoring Status to "Monitoring" and Enable Digital Monitoring to "Yes."
  - Monitoring Status documents that you are actively monitoring this contact.
  - Enable Digital Monitoring sends automatic daily outreach with assessment links (see job aid) if Preferred
    Method of Contact is set to "Text Message" or "Email" and DOB is provided. It also creates a blank initial
    assessment within CCTO regardless of Preferred Method of Contact. You will not be able to turn on Enable
    Digital Monitoring if a contact does not yet have a DOB. This is okay! You should still set Monitoring Status
    to "Monitoring," and you can update this field later.
- #3: Save your work: This creates an initial assessment if Enable Digital Monitoring is on.
- #4: When you are ready to collect or review contact responses, open an assessment:
  Visit the "Assessments" page at the top of your contact's monitoring event.
  - See the CD Manual Scripts Page for language to use in your contact conversation.
  - If Begin Monitoring was turned on successfully, an assessment marked "Initial" will already be created.
     Click into this assessment to begin collecting or reviewing contact responses.
  - If Begin Monitoring is set to "No," click "+New Assessment" in the top right corner of the screen.

# CCTO Micro-Training: Beginning Monitoring & Assessments Understanding Assessment Fields & Completing a Manual Assessment



This page explains key fields that may either be completed manually by the tracer (for manual phone assessments) or digitally by a contact (per the next page). **Before you create a new manual assessment, check if a blank assessment is already available** per #4 on page 1:

- If this is your contact's first assessment and an assessment marked "Initial" already exists, click into that assessment.
- If there is not an assessment marked "Initial," or if this is not your contact's first assessment, click "+New Assessment" in the top right corner of the screen.



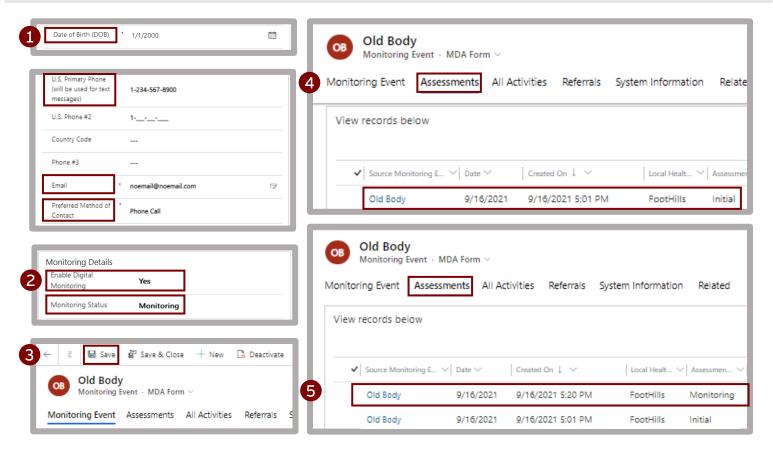
- **#1: Assessment Type:** This should read "Initial" if this is your contact's first assessment and "Monitoring" if it is not.
  - Both types collect the same symptom and test result information.
  - Initial assessments display a full list of resource need questions. Monitoring assessments ask contacts: "Do you have a new resource need?" and only request details if contacts respond "Yes."
- #2: Agreement: Select "Yes, I agree to participate" if your contact agrees.
  - Completing this field and saving will update the **Last Assessment Date** field on contact monitoring events (MEs).
- #3: Remaining Fields: Collect per your contact's responses per the script.
  - Each time COVID-19 Test Results is completed, a contact ME section for Contact Reported Test
     Results will appear and update. The contact ME section for Testing Details will not update
     automatically. Defer to your local guidance on how you should use this section.
  - The first time any symptom (except "Highest Temperature in the Past 24 Hours" or "Other Symptoms") is indicated, the contact ME field for First Date Symptoms Reported will update.
  - Each time any resource need (except "Is there any other information you would like to provide?") is indicated, the contact ME field for Most Recent Date Resource Need Reported will update.
- **#4: Save & Close:** Click to save your work and record the assessment. Review this assessment at any time by returning to the "Assessments" page.

# CCTO Micro-Training: Beginning Monitoring & Assessments





**Digital assessments** are sent to contacts as links within automated daily texts or emails, and they can complete these assessments on their own (see <u>job aid</u>). **To ensure that daily digital outreach is properly turned on** and to review completed assessments:



## **#1:** Confirm or update key information:

- Date of Birth. Contacts will use this to verify their identity and access their digital assessments.
- Email or Primary (mobile) Phone Number for contacts to receive assessments.
- **Preferred Method of Contact** to "Text Message" or "Email" depending on your contact's preference. This tells the system how to send assessment links.
- Monitoring Status to "Monitoring."
- **#2: Enable Digital Monitoring:** Setting this to "Yes" turns on automatic digital outreach if you have completed the other fields properly.
- #3: Save: This turns on digital outreach and sends the assessment link.
- **#4: Confirm creation:** Click "Assessments" at the top of your contact's monitoring event to confirm that the assessment has been created.
- **#5: Review completed assessments:** You can review any assessment completed by your contact by returning to the Assessments Page in their monitoring event and selecting an assessment from the list.